

The Schapiro Group, Inc.
127 Peachtree Street, NE
Suite 923
Atlanta, GA 30303



404-584-5215

404-581-0058 fax

schapirogroup.com

TO: Florida Department of Transportation
FROM: The Schapiro Group, Inc.
DATE: August 19, 2014
RE: Customer Satisfaction Tracking Study — District 1 Results

The Schapiro Group (TSG) interviewed 300 Florida freeway drivers across District 1 as part of a larger statewide survey effort to explore ongoing usage of, attitudes toward, and perceptions of the Florida Department of Transportation's (FDOT) Intelligent Transportation Systems (ITS) services. Data collected in 2006, 2008, 2010, and 2012, in addition to the 2014 results, allow for changes in usage and attitudes to be tracked over time. During the months of April-June 2014, TSG randomly sampled phone numbers within Charlotte, Collier, Lee, Manatee, Polk, and Sarasota Counties to obtain scientific telephone survey data. The margin of sampling error for results is $\pm 5.7\%$. This report summarizes key changes in attitudes and behaviors regarding ITS services over the past eight years.

Some research highlights from District 1 include:

Driving Patterns and Traffic Information Services

- The number of drivers on the road in District 1 has generally decreased since 2008, and the number of people driving during morning and evening rush hours continues that decline in 2014 (40% and 52%, respectively). Non-peak time activity stayed virtually the same this year during the 9am-4pm slot (73%), but decreased after 7pm (35%).
- The overall use of radio and television as sources of traffic information has remained about the same since 2008. Similar to previous years, a majority of those who get traffic information from radio and television sees these resources as at least somewhat useful.
- Drivers use several different sources for their traffic information, and those patterns changed over the past two years. Use of in-car navigation systems increased to 52%, while use of electronic message signs dropped to 50%. Also showing increases were websites on computers or cell phones (35%) and mobile apps on cell phones or tablets (26%). All other tested sources are used by less than 20% of drivers.
- Among drivers who use websites for traffic information, the top sites are now Google (26%) and local TV and radio station websites (12%), a reversal of the top two since 2012. However, 49% of drivers indicate some other site or they do not know (up from 33% in 2012).
- The 2014 survey added a question to determine what mobile apps drivers are consulting. Among drivers who use mobile apps for traffic information, the top app is Google maps (28%). No other app comes remotely close, with two-thirds (65%) of drivers indicating some other site or that they do not know.

ITS Services: 511 Traveler Information System

- When asked if they would use a service that provided traffic information through a phone call, website, mobile app, or social media site, a majority (51%) of drivers says that they would be likely to use it. This represents a reversal of the same percentage who indicated in 2012 that they would be *unlikely* to access information in these ways.
- Awareness of the 511 Traveler Information System has decreased since 2012, with 30% of respondents now saying that they know at least a little about it. Among those who are aware of the service, usage dropped to 23%, continuing a decline evident since 2008. Drivers in District 1 are most likely to learn about 511 from signs on the freeway, radio, or word-of-mouth.
- Starting in 2012, respondents who use the 511 Traveler Information System are now asked which services they use. The most popular, by far, remains the call-in service (59%), with the website (30%) displacing the mobile app (13%) at number two. Personalized services dropped slightly to 9%, while no drivers use the 511 Traveler Information System through Twitter.
- Drivers are most likely to use the 511 Traveler Information System before they leave for their destination, with that usage increasing to 59% compared to 34% in 2012. Usage while stopped in traffic approaching congestion (28%) remains the second most popular choice, followed by usage after hearing radio or tv reports (27%). Drivers also reported increased usage while on their way to their destination (26%).
- Most drivers (70%) changed their route based on the information they received from the 511 Traveler Information System. Some have changed their stress level (38%), their departure time (24%), or their arrival time (24%). All types of changes increased from 2012.

ITS Services: Electronic Message Signs

- After an increase to 88% in 2012, general usage of electronic message signs has returned to its 2010 level, with 73% of respondents using them at least once per week. Most users continue to believe the signs are easy to read (92%), accurate (91%), and useful (89%). As was the case in 2012, roughly three-quarters (76%) say they are likely to change their route based on information they see posted on electronic message signs.

ITS Services: Road Rangers

- Awareness of Road Ranger units decreased slightly, with 61% knowing about them. Only 8% of drivers who know about the service have top-of-mind awareness of how to contact a Road Ranger. When prompted with a reminder about *FHP/*347, 64% of other drivers say they know to call that number to request assistance.

- Of those who are aware of the service, 22% have used the Road Rangers, a figure which increased slightly since 2012. Nearly all drivers who could recall indicated that the driver was at least somewhat helpful. As in 2012, around three-quarters of drivers who know about Road Rangers, even those who have not had direct experience with them, believe they provide a “very useful” service.
- When asked what types of additional information they would like FDOT to provide to Florida drivers, 69% say they would like information about alternate routes to help them avoid traffic incidents. This represents an increase from 2012, and continues to be, by far, the most popular type of desired information.